

APPRAISE

By Evaluation Services, Inc.
Since 1985

40th ANNIVERSARY

QUICK, ACCURATE, AND ECONOMICAL STOCK & BOND VALUATIONS FOR TRUSTS AND ESTATES
FIRST CLASS SERVICE, INNOVATIVE TECHNOLOGY, IRS ACCEPTED

✓ IRS Form 706 Estate Tax Valuations

✓ CRUT & GRAT Valuations

✓ Issue Research For Options and Ticker Symbols

✓ IRS Form 709 Gift Tax Valuations

✓ Cost Basis Calculator

✓ Corporate Actions, Splits, & Dividends

"Industry News, Helpful Hint, & Upcoming Events" eNewsletter
February 4, 2025

Trusts & Estates News

This week's Trust and Estate article is:
"Key Takeaways from Heckerling 2025"

(Excerpt from actual article):
"Trusts & Estates advisory board members share their views on the looming sunset, purpose trusts and more."

You can read the article by clicking [HERE](#).

Last week's Trust & Estate article was:
"The First 100 Days of the New Congress"

You can read last week's eNewsletter by clicking [HERE](#).



Helpful Hint

This week's Helpful Hint is:
"What does, 'We are unable to price this issue' mean?"

When pricing a portfolio with any of our

Appraise products, users may occasionally get a value of *0* back with a message stating "We are unable to price this issue". This indicates that our data vendor, [Intercontinental Exchange \(ICE\)](#), recognizes the asset but does not have pricing information available. This can be for any number of reasons including the asset not being publicly traded, the asset being a single broker quoted stock, and various other reasons. The user can enter a manual price for the issue.



If you have questions, you can [EMAIL US](#) for more information.

Last week's Helpful Hint was:
"Jan 29 Webinar: Estate & Gift Tax Valuations in the Cloud - Now With Alternate Valuation Date Transactions!"

You can read last week's eNewsletter by clicking [HERE](#).

We explain the six methods we have for obtaining valuations from us in the **"Is there a better way to prepare your valuations?"** section of this eNewsletter. There are technology and outsourcing solutions.

Weekly Financial Market Review

Our business resides at the intersection of trust & estate law as well as financial data reporting.

We make it easy for our clients to stay current on financial market news by making a weekly market recap available by clicking [HERE](#).



Upcoming Events

(Subject to change - please monitor regularly)

- **Thu, Feb 13:** (5:00p ET) System Maintenance - all online services will be unavailable with service being restored within a few hours.
- **Sat, Feb 15:** (10:30a-2:30p ET) System Maintenance - all online services will be unavailable with service being restored within a few



hours.

- **Mon, Feb 17:** President's Day holiday. The financial markets will be closed and we will be closed as well. All online services will be available.

Is there a better way to prepare your valuations?

Why don't you consider us for your stock and bond valuations for trusts & estates? **Maybe there is a better way than how you are doing them now?**

We've been providing these valuations since 1985 and have experience and insight. Our pricing universe contains millions of US and foreign securities with corresponding decades of history. We can speak with you to potentially identify ways to improve accuracy, productivity, and output.



1. Secure online solutions (You do the work to save money.):

- **APPRAISE.API:** a secure interface that streamlines portfolio pricing. This is done by allowing clients to program directly from their trust system into our proprietary pricing system and customize it for their reporting needs. No personal or client data is exchanged. This can be a way to cut costs, improve efficiency, and improve your processing metrics.
- **APPRAISE.Web:** A web-based application, accessed through any browser, that provides stock and bond valuations for estate, gift, and trust tax. Portfolios are saved to your account and accessible wherever you are, on any device.
- **APPRAISE.Software:** Our proprietary software that has been serving our clients since 1985. Install it on any computer and get the estate, gift, and trust tax valuations you need quickly, accurately, and securely.
- **APPRAISE.SaaS:** Software as a Service (SaaS) means we host the software, which you access via the internet, and you store your data locally on your computer. This benefits you and your information technology group because a hybrid solution takes the best of software and web and combines them. You're always running the current version and do not need to install updates. Your portfolio data is stored securely on your computers. It's easy to add and remove users. The underlying technology is Citrix.
- **ESI-Direct:** Thomson Reuters ONESOURCE Trust & Estate securities valuations without valuation software. Everything is done from within the Accounting or 706, reducing steps, saving time, and increasing accuracy.

2. Outsourcing solution (We do the work and save you time.):

- Valuations can be submitted/delivered via email, fax, overnight courier, or mail. Click [HERE](#) for an order form.

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